

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

Kruthers, Heather H (for Petitioner Public Administrator)

(1) First and Final Account and Report of Successor Administrator and (2) Petition for Allowance of Ordinary and Extraordinary Commissions and Fees and (3) for Distribution

		Distribution			
DC	D: 05/04/2006	PUBLIC ADMINISTRA	ATOR, SU	ccessor	NEEDS/PROBLEMS/COMMENTS:
		Administrator, is pe	titioner.		
		Account period: 10	0/20/201	4 to 12/15/2014	
	ont. from			<b>4105 000 00</b>	
	Aff.Sub.Wit.	Accounting	-	\$125,000.00	
-		Beginning POH Ending POH	-	\$125,000.00 \$58,444.52	
✓	Verified		-	\$30, <del>444</del> .32	
1	Inventory	Executor	_	\$2,560.00	
Ě		(Statutory)		<b>4</b> 2,000.00	
	PTC	= (************************************			
✓	Not.Cred.	Attorney	-	\$2,560.00	
1	Notice of	(Statutory)			
`	Hrg				
1	Aff.Mail v	./ X/O	-	\$1,000.00	
Ľ		(for Court confirme			
	Aff.Pub.	pursuant to Local F	Rule /.18	(B)(1))	
	Sp.Ntc.	Cooks		¢05 50	
	Pers.Serv.	Costs (Costified copies)	-	\$25.50	
	Conf.	(Certified copies)			
	Screen	<b>B</b> ond	_	\$52.10	
	Letters			<b>402.10</b>	
	Duties/Supp	Distribution, pursua	nt to inte	state	
	Objections	succession, is to:			
	Video	<ul><li>Arthur K. O'</li></ul>	Brien - \$1	17,270.64	
	Receipt	<ul> <li>Michael R.</li> </ul>			
	CI Report	<ul><li>Melvin O'Br</li></ul>	rien - \$17	,270.64	
<b>√</b>	9202				
1	Order				
	Aff. Posting				Reviewed by: LV
	Status Rpt				<b>Reviewed on:</b> 02/09/2015
	UCCJEA				Updates:
	Citation				Recommendation:
<b>√</b>	FTB Notice				File 1 – O'Brien
	·	·		· ·	

Armas, J. Todd (for Gregory Taylor – Executor – Petitioner)

[Fifth] Amended Waiver of Accounting and Petition for Final Distribution and for **Allowance of Compensation** 

LD-0	D. 2 21 10	CRECORY TAYLOR Five authors with Full LAFA	NIFFDS /DDODLEAGS /COALAGENES
DO	D: 3-31-12	GREGORY TAYLOR, Executor with Full IAEA without bond, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
<b> </b>		wiinoon bona, is reiiiioner.	SEE ADDITIONAL PAGES
		Accounting is waived.	SEE ADDITIONAL I AGES
<b> </b>		<u> </u>	
	I I	[Second] Amended I&A filed 1-15-15:	
	Aff.Sub.Wit.	\$278,817.29 (cash)	
~	Verified	BOUL (1070 017 00 /)	
~	Inventory	POH: \$278,817.29 (cash)	
~	PTC	Executor (Statutory): Waived	
~	Not.Cred.		
~	Notice of	Attorney (Statutory): \$8,576.35	
	Hrg	<u> </u>	
~	Aff.Mail	Petitioner states he is the sole heir of the	
	Aff.Pub.	Mason family upon the death of the  Administrator Joseph Mason and has	
	Sp.Ntc.	waived accounting and statutory fees.	
	Pers.Serv.		
	Conf.	See also Declaration of Attorney Armas filed	
	Screen	10-15-14 and Declaration of Gregory Taylor	
~	<b>Letters</b> 11-9-12	filed 1-15-15.	
	Duties/Supp	Detitioner states the description of a section of the second	
	Objections	Petitioner states the decedent and her spouse (now deceased) signed a trust that	
	Video	Mr. Armas had prepared for them. The trust	
	Receipt	provides for a distribution identical to the	
	CI Report	distribution set forth in the decedent's will.	
>	9202	Although the trust was prepared and	
~	Order	signed, no assets were transferred to the	
	Aff. Posting	trust. Therefore, there are no trust assets. The distribution in this matter should therefore	Reviewed by: skc
	Status Rpt	be pursuant to Article Fifth of the	Reviewed on: 2-9-15
<u> </u>	UCCJEA	decedent's will.	Updates:
	Citation		Recommendation:
~	FTB Notice	Petitioner requests distribution as follows:	File 3 – Mason
		Christopher Taylor: \$10,000.00	
		Jeffrey Taylor: \$5,000.00	
		Nicole Taylor: \$5,000.00	
<u> </u>		Gregory Taylor, Sr.: \$250,240.94	

#### Page 2 - NEEDS/PROBLEMS/COMMENTS:

1. The Court may require further clarification regarding what, exactly, the cash sum indicated on the Second Amended Inventory and Appraisal represents.

**Background:** The first I&A filed 11-2-12 included \$204,522.95 in six separate investment accounts, plus real property valued at \$300,000.00. The I&A did not state whether the assets were the separate property or community property assets of the decedent; however, it was later noted that the same real property was also inventoried as an asset of the Estate of Joseph Mason in 14CEPR00064, along with one of the accounts listed.

An amended I&A filed 10-15-14 indicated cash of \$277,794.06, which also happened to be the amount of property on hand, with a footnote as follows: "The above sum represents separate property of Juanita Mason. There is an additional \$277,794.06 that is assigned to the Estate of Joseph Mason as his community property interest and not subject to distribution by this estate." (It is unclear to the Examiner what that statement means, but it appears to indicate that there was community property between the couple, but unclear what assets were in that category.)

This second amended I&A filed 1-15-15 indicates cash of \$278,817.29, with a footnote as follows: "The above sum represents separate property of Juanita Mason."

As noted on previous Examiner Notes, this simple cash sum does not appear to be an accurate representation of this decedent's assets as of the date of death. Petitioner explains in his declaration that all accounts were consolidated into one account, and some things like property taxes were paid from the account. However, even with that information, the I&A should still reflect the date of death assets and total, which was originally listed as six separate accounts totaling \$204,522.95, and the property on hand (POH) would be the consolidated lump sum at present.

**Note:** The attorney's statutory compensation should be based on the I&A date of death value, and if gains are used in calculation, detailed schedules of such gains must be included pursuant to Cal. Rule of Court 7.705(b). Here, the attorney is requesting compensation based on the new value, which is the POH, but no schedules are provided, and it is unclear if this sum originated as the six accounts noted on the original I&A.

<u>Additional note</u>: In addition to the house, which has since been removed from this estate, it was also noted that one of the original accounts listed (Golden 1) was also listed as an asset of the decedent's husband's estate. Need clarification: Does the amended value include that amount?

**SEE ADDITIONAL PAGES** 

### Page 3 - NEEDS/PROBLEMS/COMMENTS (Continued):

2. As previously noted, the decedent's will distributes her estate to the Mason Family Trust of 2004. Petitioner states that the trust was never funded; therefore, distribution should be made directly to heirs pursuant to Article Fifth of the decedent's will. Examiner Notes previously noted that the trust did appear to have been funded by the execution of Schedule A Transfer of Assets; therefore, distribution should be made to the Trust pursuant to Article Third of the Will, and a declaration pursuant to Local Rule 7.12.5 is needed.

Attorney Armas continues to request distribution directly to the heirs; however, no authority is provided.

Examiner notes also that Article Fifth of the will does not appear to distribute directly to the heirs as requested; rather, it appears to create a testamentary trust based on the 2004 trust.

**3.** Proposed order does not appear to include distribution of the residue. Need revised order based on clarification of the above noted issues and the Court's order thereon.

Horton, Lisa (for Valene Madrid – Petitioner – Guardian/Mother)

(1) First Account Current and Report of Guardian and Petition for its Settlement; (2) for Allowance of Attorney Fees and Reimbursement of Costs Advanced; and (3) Request for Waiver of Further Accountings

	VALENE AAA DRID. Cuardian is notitioner	NIEEDS /DDODI EAAS /COAAAAENTS:
	VALENE MADRID, Guardian, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
Cont. from Aff.Sub.Wit.  Verified	See petition for details	Declaration filed of Valene Madrid re:     Annuity Account with Standard     Insurance Company filed 03/11/2014     states funds are deposited into an annuity with standard insurance company, funds are not federally insured. Probate Code §2453
Inventory		requires the funds to be insured.
PTC		·
Not.Cred.  √ Notice of		<b>Note:</b> Petition requests waiver of further accountings. If the Court does not waive further accountings,
Hrg √ Aff.Mail		the following Status Hearing shall be set:
Aff.Pub.		<ul> <li>Wednesday, February 8, 2017</li> </ul>
Sp.Ntc.		at 9:00a.m. in Department 303,
Pers.Serv.		for the filing of the 2 <sup>nd</sup> Account.
Conf. Screen		Pursuant to Local Rule 7.5 if the required documents are filed 10 days
Letters		prior to the date set the status
Duties/Supp		hearing will come off calendar and
Objections		no appearance will be required.
Video Receipt		
CI Report		
√ 2620(c)		
√ Order		
Aff. Posting		Reviewed by: LV
Status Rpt	_	<b>Reviewed on:</b> 02/09/2015
UCCJEA	_	Updates:
Citation		Recommendation:
FTB Notice		File 4 - Dupree

Atty Kruthers, Heather H

(1) First and Final Account and Report of Administrator and (2) Petition for Allowance of Ordinary and Extraordinary Commissions and Fees and for (3) Distribution

	ווטווטמווומו	
Age:		NEEDS/PROBLEMS/COMMENTS:
DOD:		
		CONTINUED TO 3-10-15
Cont. from		Per Attorney Request
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of		
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by:
Status Rpt		Reviewed on: 2-6-15
UCCJEA	_	Updates:
Citation	_	Recommendation:
FTB Notice		File 5 – Danell

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Knapp, Bonnie J. (for Eric Schloen – Special Administrator – Petitioner)

(1) Petition for Termination of Further Proceedings and (2) Discharge of the Personal Representative

DO	D: 8-20-13	SPECIAL ADMINISTRATION EXPIRES 2-26-16	NEEDS/PROBLEMS/COMMENTS:
		<b>ERIC SCHLOEN</b> , Special Administrator, is Petitioner.	
<b>&gt;</b>	Aff.Sub.Wit.	Petitioner was appointed Special Administrator for the purpose of obtaining health care benefits for the decedent.	
	PTC Not.Cred.	Petitioner states no assets have been found, discovered, or ascertained and at all times the estate has been insolvent.	
~	Notice of Hrg  Aff.Mail V  Aff.Pub.	There are no costs, expenses, or premiums on surety bonds, including funeral expenses and attorney fees.	
	Sp.Ntc. Pers.Serv. Conf.	Notice pursuant to Probate Code §9202 was given as required.	
<b>~</b>	Screen Letters Duties/Supp	The Special Administrator has concluded the reason and purpose of this estate and there is no longer any need for continued administration. Medi-Cal eligibility has been	
	Objections Video Receipt CI Report	established.  Petitioner prays for an order terminating	
<b>&gt;</b>	9202 Order	further proceedings and discharging Petitioner as the personal representative of the estate.	
	Aff. Posting Status Rpt UCCJEA		Reviewed by: skc Reviewed on: 2-10-15 Updates:
~	Citation FTB Notice		Recommendation: File 6 - Sanchez

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Kruthers, Heather H (for Petitioner/Administrator Public Administrator)

(1) First and Final Account and Report of Administrator and (2) Petition for Allowance of Ordinary and Extraordinary Commissions and Fees and for (3) Distribution

Distribution							
DOD: 7/24/2007	<b>PUBLIC ADMINISTRATOR</b> , Administrator, is	NEEDS/PROBLEMS/COMMENTS:					
	petitioner.						
	Account period: 4/14/14 - 12/23/14						
	Account penda. 4/14/14 - 12/20/14						
Cont. from	Accounting - \$180,000.00						
Aff.Sub.Wit.	Beginning POH - \$180,000.00						
√ Verified	Ending POH - \$ 36,962.59						
√ Inventory	Administrator - \$2,200.00						
✓ PTC	(statutory)						
	Administrator x/o - \$1,248.00						
√ Not.Cred.	(per Local Rule for sale of real property						
✓ Notice of W/	and preparation of tax returns.)						
Hrg	Attorney - <b>\$2,200.00</b>						
✓ Aff.Mail	(statutory)						
Aff.Pub.							
Sp.Ntc.	Bond - <b>\$300.00</b> (o.k.)						
Pers.Serv.	Court fees - <b>\$460.50</b>						
Conf.	(filing fee, certified copies)						
Screen	(						
✓ Letters 4/14/14	Distribution, pursuant to intestate						
<b>V</b>	succession, is to:						
Duties/Supp	5 1 7						
Objections	Derek Thomas - <b>\$2,455.26</b>						
Video	(\$10,184.70 less child support levy of \$7,729.43)						
Receipt	ψ/,/∠7. <del>4</del> 3  						
CI Report	Javonni M. Thomas - \$10,184.70						
√ 9202	· ·						
√ Order	Keshawn Monte Thomas - \$10,184.70						
Aff. Posting	Department of Child Support Services	Reviewed by: KT					
Status Rpt	- \$7,729.43	Reviewed on: 2/10/15					
UCCJEA	]	Updates:					
Citation	]	Recommendation:					
✓ FTB Notice		File 7 - Thomas					

Cook, Camille K. (for Petitioner Edwin Avalos Lopez)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

$\blacksquare$			T TEATRO DA DA EXPLICACIÓN DE CARGO DE LA CARGO DEL LA CARGO DE LA		
<b>—</b>			TEMPORARY EXPIRES 2/19/15	NE	EEDS/PROBLEMS/COMMENTS:
	nd from		<b>ERWIN AVLAOS LOPEZ</b> , ward, is petitioner	1.	Petition does not request that the court make the specific findings needed regarding eligibility for
Co	ont. from				Special Immigrant Juvenile Status.
✓	Aff.Sub.Wit.  Verified		Please petition for details.	2.	Need Order Regarding Eligibility for Special Immigrant Juvenile
	PTC PTC		Declaration of Erwin Avalos Lopez, minor, filed on 12/16/14		Status (Judicial Council form #GC-224).
		Χ		3.	Need Notice of Hearing.
	Aff.Mail Aff.Pub.	Χ	Points and Authorities in Support of Petition for Guardianship filed on 1/21/15.	4.	Need proof of service of the Notice of Hearing along with a
	Sp.Ntc.				copy of the Petition or Consent and Waiver of Notice or
	Pers.Serv.		Court Investigator Report filed on 2/9/15		Declaration of Due Diligence on:
✓	Conf. Screen				a. Bernabe Avalos (paternal grandfather)
✓	Letters				b. Modesta Jacinto (paternal grandmother)
✓	Duties/Supp				c. Izabel Lopez Santos (maternal grandmother)
	Objections				d. Abner Lopez (brother)
	Video Receipt				e. Nancy Lopez (sister)
✓	CI Report				
	9202				
✓	Order				
	Aff. Posting			Re	viewed by: KT
	Status Rpt			Re	viewed on: 2/10/15
✓	UCCJEA				odates:
	Citation			_	commendation:
	FTB Notice			File	e 8 - Lopez
					Q

#### Hailey Suarez & Hayden Suarez (GUARD/P) Case No. 14CEPR01133 9A

McCoy, Gail (pro per – maternal grandmother/Petitioner)

Petition for Appointment of Temporary Guardianship of the Person (Prob. C. 2250) Atty

	Petition for Appointment of Temporary Guardianship of the Person (Prob. C. 2250)					
Но	iley, 14		TEMPORARY EXPIRES 02/18/15	NEEDS/PROBLEMS/COMMENTS:		
На	ıyden, 7		<b>GAIL MCCOY</b> , maternal grandmother, is Petitioner.	CONTINUED FROM 02/18/15 See page 9B for notes regarding the general hearing.		
			Father: JOSEPH SUAREZ			
Co	ont. from 01051	15	Mother: <b>MELISSA FLYNN</b> – Consent &	Need Notice of Hearing.		
	Aff.Sub.Wit.		Waiver of Notice filed 12/17/14	2. Need proof of personal		
<b>√</b>	Verified			service of Notice of Hearing		
	Inventory		Paternal grandfather: DECEASED	with a copy of the Petition		
	PTC		Paternal grandmother: DONNA FALCONE	for Appointment of Temporary Guardian of the		
	Not.Cred.		Maternal grandfather: DECEASED	Person <u>or</u> Consent & Waiver		
	Notice of	Х		of Notice <u>or</u> Declaration of		
	Hrg		Petitioner states - SEE PETITION FOR DETAILS	Due Diligence for: a. Joseph Suarez (father)		
	Aff.Mail Aff.Pub.		DETAILS	b. Hailey Suarez (minor)		
	Sp.Ntc.			, , , ,		
	Pers.Serv.	Х				
	Conf.					
	Screen					
	Letters	Х				
<b>✓</b>	Duties/Supp					
	Objections					
	Video Receipt					
-	CI Report					
	9202					
	Order	Х				
	Aff. Posting			Reviewed by: JF		
	Status Rpt			<b>Reviewed on:</b> 02/09/15		
<b>✓</b>	UCCJEA			Updates:		
	Citation ETP Notice			Recommendation:		
<u> </u>	FTB Notice			File 9A - Suarez		

**9A** 

9B Hailey Suarez & Hayden Suarez (GUARD/P) Case No. 14CEPR01133

Atty Miller, James L. (for Gail McCoy – maternal grandmother/Petitioner)

Atty Suarez, Joseph (pro per – father/Objector)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Ц	iley, 14		TEMPORARY EXPIRES 02/18/15		EDS/PROBLEMS/COMMENTS:
	шеу, 14		TENTI ORAKI EXI IKES SE/10/10		LEDS/TROBLEMS/COMMENTS.
На	yden, 7		<b>GAIL MCCOY</b> , maternal grandmother, is Petitioner.	1.	3.
			Father: JOSEPH SUAREZ	2.	Need proof of service at least 15 days before the hearing of
Сс	Cont. from		Mother: <b>MELISSA FLYNN</b> – Consent & Waiver of Notice filed 12/17/14		Notice of Hearing with a copy of the Petition for Appointment of Guardian of
	Aff.Sub.Wit.		Paternal grandfather: DECEASED		the Person <u>or</u> Consent &
✓	Verified		Paternal grandmother: DONNA FALCONE		Waiver of Notice or
	Inventory		Maternal grandfather: DECEASED		Declaration of Due Diligence for:
	PTC		Maioriai giariaiairioi. DECE/OLD		a. Joseph Suarez (father) –
	Not.Cred.		Petitioner states See Petition for details		personal service required
	Notice of	Х	Objection to Guardianship filed 01/29/15 by		b. Paternal grandmother – service by mail sufficient
	Hrg		Joseph Suarez (father)		c. Hailey Suarez (minor) –
	Aff.Mail	Χ	Court Investigator Iulia Nagrata filed a report		personal service required
	Aff.Pub.		Court Investigator Julie Negrete filed a report on 02/09/15.		
	Sp.Ntc.				
	Pers.Serv.	Х			
✓	Conf.				
	Screen				
✓	Letters				
✓	Duties/Supp				
	Objections				
	Video				
	Receipt				
<u> </u>	CI Report	Х			
_	9202				
<u> </u>	Order			_	
	Aff. Posting				viewed by: JF
	Status Rpt			_	viewed on: 02/09/15
Ľ	UCCJEA			-	odates: 02/10/15
$\vdash$	Citation				commendation:
	FTB Notice			FII(	e 9B - Suarez

Jaech, Jeffrey A. (for Co-Trustees Betty Ann Bianchi and Robert W. Bianchi)

Status Hearing Re: Filing of the Fifth Account

		BETTY ANN BIANCHI and ROBERT W.	NEEDS/PROBLEMS/COMMENTS:
		BIANCHI are Co-Trustees.	
		The Fourth Account for the account	1. Need Fifth Account or current
	t. from	period ending 12/31/13 was approved	written status report pursuant to
1	Aff.Sub.Wit.	on 7/21/14.	Local Rule 7.5 which states in all
\	Verified	Minute order dated 7/21/14 set this	matters set for status hearing
	nventory	status hearing for the filing of the Fifth	verified status reports must be filed no later than 10 days before
F	PTC	Account.	the hearing. Status Reports must
1	Not.Cred.		comply with the applicable code
1	Notice of		requirements. Notice of the status
-	Hrg		hearing, together with a copy of
-	Aff.Mail		the Status Report shall be served
	Aff.Pub.		on all necessary parties.
	Sp.Ntc.		
F	Pers.Serv.		
	Conf.		
-	Screen		
	Letters	  -	
	Duties/Supp		
<b>-</b>	Objections		
	Video		
-	Receipt	<u> </u>	
	CI Report	=	
	9202	1	
-	Order	=	Daviance d how KT
-	Aff. Posting	4	Reviewed by: KT
	Status Rpt UCCJEA	-	Reviewed on: 2/10/15
-	Citation	-	Updates: Recommendation:
	FTB Notice	1	
'	ID MOIICE		File 13 - Silberstein

Durost, Linda K. (for Toni Richardson – Administrator)

Probate Status Hearing for Failure to File a First Account or Petition for Final Distribution

DOD: 06/02/2011	<b>TONI RICHARDSON,</b> daughter, was appointed Administrator with Limited Authority, without bond, on 02/16/12.	NEEDS/PROBLEMS/ COMMENTS:
	Letters issued on 02/22/12.	Minute Order of 12/17/2014:
Cont. from 111214, 121714 Aff.Sub.Wit.	Partial No. 1 Inventory and Appraisal filed 04/16/2013 shows an estate valued at \$175,500.00.	Counsel's request for continuance is granted.
Verified   Inventory	Inventory and Appraisal filed 05/14/2013 shows the estate reappraised at \$170,000.00	
PTC Not.Cred.	Order Confirming Sale of Real Property was filed 05/21/13.	Need First     Account or
Notice of Hrg Aff.Mail	Receipt and Acknowledgment of Order for the Deposit of Money Into Blocked account filed 09/20/2013 indicates \$105,594.07 was received.	Petition for Final Distribution or
Aff.Pub.	Notice of Status Hearing filed 09/15/2014 set this matter for hearing.	current status report.
Sp.Ntc. Pers.Serv.	Notice was mailed to Toni Richardson and Attorney Warren Felger on 09/15/2014.	
Conf. Screen Letters	Former Status Conference Statement filed 12/11/2014 states petitioner originally filed documents in this matter pro per however became	
Duties/Supp Objections	overwhelmed by the requirements of the Court regarding preparation and filing of documents, she retained attorney Warren Felger to assist	
Video Receipt	her. Mr. Felger filed many of the documents prepared in this matter, and advised her what to do as Administrator. Due to the Administrator's inability to reach Mr. Felger, who had been her attorney	
CI Report	on several other matters for her, she terminated Mr. Felger's services and retained Linda K. Durost, Esq. to assist them in preparing and filing	
9202 Order	the last item to be filed, an Account and Petition for Final Distribution.  Ms. Durost was retained on or about 10/07/2014. From the date of	
Aff. Posting	retention, Ms. Durost has made several attempts to contact Mr. Felger.  On the fifth attempt, Mr. Felger returned the call and signed the	Reviewed by: LV
Status Rpt	prepared Substitution. It took approximately 1.5 weeks to get his file.	<b>Reviewed on:</b> 02/09/2015
UCCJEA Citation	The file was in disarray, and attorney Durost took a great deal of time to go through the history, as well as numerous accounting, bank account	Updates:  Recommendation:
FTB Notice	statements, and many other very confusing documents.  The accounting is quite complicated due to advice given to the Administrator regarding how and what she needed to do for the estate and records to keep. Attorney Durost must prepare and refile a corrected Inventory and Appraisal to remove a sum from the probate assets that are not a part of the probate distribution. Administrator therefore requests that a continuance of this matter be given to allow the tax returns to be filed, a corrected Inventory and Appraisal to be prepared and filed, and address any further issues. A 60-day	File 14 – Bonham
	continuance is requested.	14

Durost, Linda K. (for Pat Hernandez – Successor Administrator)

Status Hearing Re: Filing of the First Account and/or Petition for Final Distribution

MANUEL ROJAS, brother, was appointed as Administrator of the Estate with Full IAEA and without bond on 02/14/13. Letters of Administration were issued on 02/20/13.  Cart for 20 20 20 20 20 20 20 20 20 20 20 20 20	
Letters of Administration were issued on 02/20/13.  As of 02/09/15, nothing further been filed.	
02/20/13. been filed.	urther has
Cont. from 041814	
071814, 101614, Order on Ex Parte Petition to Amend	
<b>121614 Petition for Probate</b> filed 07/23/13 1. Need First Account an	nd/or
Aff.Sub.Wit. ordered that Manuel Rojas file a bond Petition for Final Distrib	
Verified in the amount of \$315,000.00. Bond was current written status r	eport.
Inventory   later increased to \$400,000.00 by Ex	
Parte Order to Increase Bond filed 08/16/13.	
Not.Cred.	
Notice of Bond was filed 08/26/13 and new	
Hrg Letters of Administration were issued to	
Aff.Mail Manuel Rojas on 08/28/13.	
Aff.Pub. Administrator Manuel Rojas died on	
Sp.Ntc. 12/08/13. Pat Hernandez, sister, was	
Pers.Serv. appointed as successor Administrator	
Conf. with bond in the amount of \$400,000.00	
<b>Screen</b> on 03/19/14. <b>Bond</b> was filed 03/25/14	
Letters and Letters of Administration were	
Duties/Supp issued to Pat Hernandez on 03/25/14.	
Objections Minute Order from hearing appointing	
Video   Manuel Roias as Administrator on	
Receipt 02/14/13 set this matter for status	
CI Report regarding filing of the First	
9202 Account/Petition for Distribution.	
Order  Aff Posting  Status Conference Statement filed  Reviewed by: IE	
All. Fosiling 12/11/14 states: The accounting of this	
estate was complicated by the death	
of the first administrator. His records updates:	
Citation   were not easily obtainable from his records after his death. He naid hills   Recommendation:   File 15 - Sanchez	
records after this death. The paid bills	
with money orders instead of keeping a checkbook and did not keep all copies	
of the money orders. An accounting is	
now being compiled and it is planned	
to be filed within the next 30 days. A 60	
day continuance is requested.	

Rindlisbacher, Curtis D. (for Timothy Warren Fletcher – Son – Conservator)
Status Hearing Re: Receipt for Blocked Account

	TIMOTHY WARREN FLETCHER, Son, was	NEEDS/PROBLEMS/COMMENTS:
	appointed as Conservator of the Person	·
	and Estate on 10-16-14 with bond of \$380,129.64.	<ol> <li>Need receipt for blocked account (MC-356).</li> </ol>
	\$300,127.84.	accoon (MC-338).
Cont from 111214, 120314, 012815	At the hearing on 10-16-14, the Court set this status hearing for the filing of the	
Aff.Sub.Wit.	bond.	
Verified		
Inventory	On 12-3-14, the Court authorized a reduced bond in the amount of	
PTC	= \$250,000.00 and the remaining	
Not.Cred.	\$130,129.64 to be deposited to a	
Notice of	blocked account, and continued this	
Hrg	status hearing for the filing of the bond	
Aff.Mail	and the receipt for blocked account.	
Aff.Pub.	Bond was filed and Letters issued on	
Sp.Ntc.	= 12-15-14.	
Pers.Serv.		
Conf.		
Screen	_	
Letters	_	
Duties/Supp		
<b>Objections</b>		
Video		
Receipt	=	
CI Report	=	
9202	_	
Order	_	Paviawad hygaka
Aff. Posting	-	Reviewed by: skc
Status Rpt UCCJEA	-	Reviewed on: 2-6-15 Updates:
Citation	<b>-</b>	Recommendation:
FTB Notice	╡	File 16 - Pace
FIB NOIICE		rile 10 - ruce

16A

Rindlisbacher, Curtis D. (for Timothy Warren Fletcher – Son – Conservator)
Status Hearing Re: Receipt for Blocked Account

		TIMOTHY WARREN FLETCHER, Son, was	NE	EEDS/PROBLEMS/COMMENTS:
		appointed as Conservator of the Person		
		and Estate on 10-16-14 with bond of	2.	Need Inventory and Appraisal
		\$380,129.64.		pursuant to Probate Code §2610 or verified written status report
Cont	from 111214,	At the hearing on 10-16-14, the Court		pursuant to Local Rule 7.5.
12031	14, 012815	set this status hearing for the filing of the		poisoum to rocal Role 7.0.
A	Aff.Sub.Wit.	Inventory and Appraisal.		
V	'erified	]		
In	nventory	On 12-3-14, the Court authorized a		
P1	TC	reduced bond in the amount of \$250,000.00 and the remaining		
N	lot.Cred.	\$130,129.64 to be deposited to a		
N	lotice of	blocked account, and continued this		
	rg	status hearing for the filing of the bond		
_	ff.Mail	and the receipt for blocked account		
A	ff.Pub.	(See Page A).		
	p.Ntc.	Bond was filed and Letters issued on		
Pe	ers.Serv.	12-15-14.		
	Conf.			
_	creen	_		
_	etters	_		
	uties/Supp			
	bjections			
	ideo			
	eceipt	╡		
	CI Report	4		
<b></b>	202	=		
<del></del>	order off. Posting	=	Po	viewed by: skc
	tatus Rpt	╡		eviewed by: SRC
	CCJEA	=		odates:
	itation	-		commendation:
	TB Notice	1		e 16 – Pace

16B

Petition for Appointment of Probate Conservator of the Person and Estate (Prob. C. 1820, 1821, 2680-2682)

			See petition for details.	NEEDS/PROBLEMS/COMMENTS:
				Court Investigator advised rights on 12-22-14
Co	nt 011415			Voting rights affected – need minute order
	Aff.Sub.Wit.			Minute Order 1-14-15: Examiner
~	Verified			notes handed in open court;
	Inventory			matter continued to allow time for defects to be cured.
	PTC			Note: As of 2-6-15, nothing further
	Not.Cred.			has been filed. The following issues
>	Notice of			remain noted:
	Hrg			Need Confidential
<u> </u>	Aff.Mail	W		Conservator Screening Form
	Aff.Pub.			(GC-314).
	Sp.Ntc.			2. Need Citation.
~	Pers.Serv.	W		Note: Proof of Personal Service
	Conf.	Χ		attached to Notice of Hearing
	Screen			filed
	Letters	Χ		12-5-14 indicates that the proposed conservatee was
~	Duties/Supp			served with a citation;
	Objections			however, the Citation
	Video	Χ		(mandatory Judicial Council
	Receipt			form GC-320) has not been filed.
~	CI Report			
	9202			3. Need video receipt pursuant
	Order			to Local Rule 7.15.8.A.
				4. Need Letters.
				T. NEGU LENGIS.
	Aff. Posting			Reviewed by: skc
	Status Rpt			Reviewed on: 2-6-15
	UCCJEA			Updates:
	Citation	Χ		Recommendation:
	FTB Notice			File 17 – Ohanesian

# Aiden Lucas Mendoza-Wallace (GUARD/P)

Case No. 14CEPR01132

Zambrano, Della Ann (Pro Per – Maternal Grandmother – Petitioner) Atty Atty

Mendoza, Alyssa A. (Pro Per – Non-relative – Petitioner)

18

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

			See petition for details.	NEEDS/PROBLEMS/COMMENTS:
				If this petition goes forward, the following issues exist:
<b>&gt;</b>	Aff.Sub.Wit. Verified Inventory PTC Not.Cred.			<ol> <li>Need Court Investigation (and/or DSS Investigation), clearances.</li> <li>Need clarification: Petitioner Della Ann Zambrano states she</li> </ol>
	Notice of Hrg	X		is the maternal grandmother, but Rosa Zambrano Aguilera of West Monroe, LA, is listed as the maternal grandmother on
	Aff.Pub.	X		the Child Information
-	Sp.Ntc.			Attachment. What is Petitioner
<b> </b>	Pers.Serv.	Х		Della Ann Zambrano's
~	Conf.			relationship to the minor?
	Screen			3. Need Notice of Hearing to all
~	Letters			relatives pursuant to Probate
~	Duties/Supp			Code §1511.
	Objections			
	Video Receipt			
	CI Report	Х		
	9202			
~	Order			
	Aff. Posting			Reviewed by: skc
	Status Rpt			Reviewed on: 2-10-15
~	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 18 – Mendoza-Wallace

18

Setrak Vareldjian (Det Succ) Vareldjian, Aida (Pro Per Petitioner) Atty Atty Vareldjian, Amalia (Pro Per Petitioner)

Petition to Determine Succession to Real Property (Prob. C. 13151)

	See petition for details.	NEEDS/PROBLEMS/COMMENTS:
Aff.Sub.Wit.	·	1. The petition is blank at #9a(1) and (2). Was the decedent survived by a spouse, or no spouse, and if no spouse, was the decedent divorced or never married, or is the spouse deceased?
Verified  Verified  Inventory  PTC  Not.Cred.  Notice of ×		Note: Petitioners provide a status dissolution judgment from 1999 between the decedent and Nunik Aslanyan and an interspousal grant deed from 2004 where Nunik Aslanyan conveyed the real property
Aff.Mail Aff.Pub. Sp.Ntc.		to the decedent; however, the decedent's death certificate in 2008 indicates that the informant was "Nunik Aslanyan, Wife."
Pers.Serv. Conf. Screen Letters		2. The petition is blank at #9a(7) and (8). Was the decedent survived by issue of a predeceased child?
Duties/Supp Objections Video Receipt		3. Need Attachment 11, which should contain a legal description of the real property passing to Petitioners and state the decedent's interest in the real property.
CI Report 9202 ✓ Order		4. Need Attachment 14, which should state the names and relationships to the decedent of all heirs, including Petitioners.  Net Continue and the state their states their states are stated to the state and the states are stated to the state and the states are stated to the state and the state are stated to the st
		Note: Petitioners do not state their relationship to the decedent.  Note: If other relatives/heirs are listed, need Notice of Hearing pursuant to Probate Code §13153.
Aff. Posting Status Rpt UCCJEA Citation FTB Notice		Reviewed by: skc  Reviewed on: 2-10-15  Updates:  Recommendation:  File 19 - Vareldjian
I I I I I I I I I I I I I I I I I I I	<u> </u>	

# 20 Marvin George Nelson (Estate) Case No. 15CEPR00029

## Atty Nelson, Kelley (Pro Per – Son – Petitioner)

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

	Administer Under IAEA (Prob. C. 8002, 10450)					
DO	D: 12-24-13		KELLEY NELSON, Son, is Petitioner	NE	EDS/PROBLEMS/COMMENTS:	
			and requests appointment as	1.	Petitioner did not provide a copy of the	
			Executor with Full IAEA without		will with the petition pursuant to #3e(2)	
			bond.		and Probate Code §8002(b).	
			Full IAEA – need publication	2.	The original will has not been deposited	
	Aff.Sub.Wit.	Х	TOWN TOO DOOM CONTON		with the Court pursuant to Probate Code	
~	Verified		Will dated 8-12-09 (not provided)		§8200. Need original will.	
_	Inventory		, ,	3.	Need publication pursuant to Probate Code §8120.	
<b>-</b>	PTC		Residence: Clovis, CA		•	
	Not.Cred.		Publication: Need	4.		
<b> </b>	Notice of	V	Estimated value of estates		Estate (DE-121) and service on relatives listed at #8 of the petition pursuant to	
	Petition to	Х	Estimated value of estate: \$120,208.55		Probate Code §8110.	
	Administer		\$120,200.55		Note: Petitioner used the regular Notice	
	Estate		Note: Petitioner filed a Final		of Hearing form DE-120; however, notice	
<b>-</b>	Aff.Mail	W	Inventory and Appraisal indicating		regarding opening estate administration	
	Aff.Pub.	Х	an estate value of \$170,208.55;		requires specific form and language.	
	Sp.Ntc.		however, Petitioner indicates that	5.	Need date of death of deceased spouse	
	Pers.Serv.		the real property is encumbered.		pursuant to Local Rule 7.1.1.D.	
	Conf.		Probate Referee: Steven Diebert	6.	The petition is blank at #5a(3) and (4).	
	Screen		Trobate Referee. Steven Dieben		Was the decedent survived by a	
~	Letters		Note: This matter would have been	_	registered domestic partner?	
~	Duties/Supp		assigned to Probate Referee Rick	<b> </b>	The petition is blank at #5a(6) and (7). Was the decedent survived by issue of a	
	Objections		Smith pursuant to Probate Court		predeceased child?	
	Video		practices; however, I&A filed concurrently with the petition was	No	ote: If granted, the Court will set a status	
	Receipt		prepared by Probate Referee		earing for the filing of the petition for final	
	CI Report		Steven Dlebert.		stribution for <u>June 15, 2016</u> pursuant to	
	9202				obate Code §12200. If the petition is filed irsuant to Local Rule 7.5.C, the status	
~	Order			_	earing may be taken off calendar.	
					-	
					ote: A status hearing for the filing of the I&A not included since the petitioner has	
					ready filed the I&A concurrently with this	
					tition. However, Examiner notes that the	
					A as filed includes a negative balance for	
					IRA account. The Court may require	
					arification.	
	Aff. Posting				viewed by: skc	
	Status Rpt			_	viewed on: 2-10-15	
	UCCJEA				odates:	
	Citation			_	commendation:	
	FTB Notice			File	e 20 - Nelson	
					20	

Haden, Robert T (for Petitioner/Trustee Mark Olsen)

Second Account and Report of Successor Trustee and Petition for Allowance of Trustee Fees and Attorney Fees

Please see petition for details.  Cont. from 121814, 020315  Aff.Sub.Wit.  ✓ Verified  Inventory  PTC  Not.Cred.  ✓ Notice of Hrg  Need Amended Pe Supplement to the was filed on 1/9/15 changes material for beginning and end hand. It appears the petition should be figive the court, and parties, one complete pleading. It should the prior examiner of an amended plead Examiner has not response to the supplement to the supplem	Second Account The supplement facts such as the ding property on hat an amended filed in order to d all interested lete and concise d be noted that notes suggested ding be filed.
✓ Verified       petition should be find give the court, and parties, one complete pleading. It should be find the prior examiner in an amended pleading. It should be find the prior examiner in the prior examiner in the prior examiner in the prior examiner has not respect to the prior examiner to the prior examiner in the prior exa	filed in order to d all interested lete and concise d be noted that notes suggested ding be filed.
for this hearing. Not	Second Account otes provided are
Sp.Ntc.  Pers.Serv.  Conf. Screen  Letters  Duties/Supp  Objections  Video Receipt  CI Report  9202  1. Beginning proper this, the 2 <sup>nd</sup> acc \$335,240.14. The on hand in the feature that the property on har account must be ending property first account. Naccounting.	perty on hand in count is the ending property first account was difference of the beginning and for the 2nd the same as the try on hand in the leed amended
✓ Order     Please see add       Aff. Posting     Reviewed by: KT	idilional page.
Status Rpt Reviewed on: 2/10	0/15
UCCJEA Updates:	
Citation Recommendation:	
FTB Notice File 21 - Bustos	

#### **NEEDS/PROBLEMS/COMMENTS (cont.):**

- 1. Attorney fees includes \$120 for communications with the Probate Examiner (identified as court investigator in the declaration). Local Rule 7.17B considers communication with the Probate Examiner to be a normal cost of doing business and is therefore not reimbursable.
- 2. Disbursement schedule shows payments totaling \$655.00 to Grey Roberts for professional services. Need more information on what professional services where provided.
- 3. Disbursement Schedule shows legal fees totaling \$6,223.26. Order approving the First Account allowed attorney fees totaling \$4,962.50. A difference of \$1,260.76. Need clarification.
- 4. Disbursement schedule identifies several disbursements (totaling \$6,000.08) as "--split--" Probate Code §1062(b) requires the disbursement schedule to include the nature and purpose of each item, the name of the payee and the date thereof. Need clarification.
- 5. Disbursement schedule shows a payment of \$507.40 on \$10/25/12 without identifying what the purchase was for. Need clarification.
- 6. Order does not comply with Local Rule 7.6.1C. All orders settling accounts shall contain a statement as to the balance of the estate on hand, specifically noting the amount of cash included in the balance.

**Note:** If the petition is granted, status hearings will be set as follows:

• Wednesday, September 28, 2016 at 9:00 a.m. in Department 303, for the filing of the third account.

Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.

Bridget Elaine Ward-Bilyeu (GUARD/P)

Fletcher, Matthew E. (for Petitioners Heather Ward and Lori Ward)

Petition for Appointment of Temporary Guardianship of the Person

			See petition for details.	NE	EDS/PROBLEMS/COMMENTS:
				1.	Need Notice of Hearing.
					_
	Aff.Sub.Wit.			2.	Need proof of personal service of Notice of Hearing
~	Verified				at least five court days prior to the hearing pursuant to
	Inventory				Probate Code §2250(e) on:
	PTC				- Jeremy Bilyeu (Father)
	Not.Cred.				- Laura Ward (Mother)
	Notice of Hrg	Х			
	Aff.Mail				
	Aff.Pub.				
	Sp.Ntc.				
	Pers.Serv.	Χ			
~	Conf.				
	Screen				
<b>&gt;</b>	Letters				
~	Duties/Supp				
	Objections				
	Video Receipt				
	CI Report				
	9202				
>	Order				
	Aff. Posting			Re	eviewed by: skc
	Status Rpt			Re	viewed on: 2-10-15
~	UCCJEA			_	odates:
	Citation				commendation:
	FTB Notice			Fil	e 22 – Ward-Bilyeu

# 24 Nathan Finney, Breanna Finney & Rikki Finney (GUARD/P)

Case No. 15CEPR00122

Atty Stone, Tennison Anita (pro per – step-mother/Petitioner)

Atty Finney, Breanna Marie (pro per – minor/Petitioner)

Petition for Appointment of Temporary Guardian of the Person (Prob. C. 2250)

Nathan, 16			TEMPORARY GRANTED EX PARTE	NEEDS/PROBLEMS/COMMENTS:
			EXPIRES 02/18/15	, ,
Bre	Breanna, 14			<ol> <li>Need Notice of Hearing.</li> </ol>
			GENERAL HEARING: 04/08/15	0. New Joseph Community
			TENNISON STONE, step-mother, and	Need proof of personal     service at least 5 court days
			BREANNA FINNEY, minor, are Petitioners	before the hearing of Notice
Со	nt. from		and request that <b>TENNISON STONE</b> be	of Hearing with a copy of the
	Aff.Sub.Wit.		appointed as guardian.	Petition for Appointment of
✓	Verified			Temporary Guardianship of
	Inventory		Father: <b>RICK FINNEY</b>	the Person <u>or</u> Consent &
	PTC		Mother: <b>DESIRE NEVES</b>	Waiver of Notice <u>or</u>
	Not.Cred.		MOINGI. DESIRE NEVES	Declaration of Due Diligence for:
	Notice of	Х	Paternal grandfather: RICK FINNEY	a. Rick Finney (father)
	Hrg		Paternal grandmother: TONI KEMP	b. Desire Neves (mother)
	Aff.Mail			c. Nathan Finney (minor)
	Aff.Pub.		Maternal grandfather: LEONARD NEVES	d. Breanna Finney (minor)
	Sp.Ntc.		Maternal grandmother: MARY NEVES	
	Pers.Serv.	Χ	Sibling: CHANTELLE FINNEY (3),	
✓	Conf.		SHAYNNA FINNEY (6)	
	Screen			
✓	Letters		<b>Petitioners state –</b> see Petition for details.	
✓	Duties/Supp			
	Objections			
	Video			
	Receipt			
	CI Report			
	9202			
<b>✓</b>	Order			
	Aff. Posting			Reviewed by: JF
	Status Rpt			<b>Reviewed on:</b> 02/10/15
<b>V</b>	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 24 - Finney